

Steadyhand

Steadyhand Investment Management is an employee-owned Canadian investment management company whose mission is to help Canadians build their wealth through a better, more human experience. For more information, see <https://www.steadyhand.com>

Job Description: Operations Specialist (Vancouver)

Responsibilities:

As a boutique firm, we are looking for employees who share our passion for creating a top-tier investment experience for all Canadians, and who are aligned with our investment and client service philosophy. We are an organization that respects everyone's input and values teamwork. Employees must be flexible as to their job duties and time commitment.

This is a diverse role involving many facets of our business. The team member will initially be expected to perform the following duties:

- Assist the client service and operations teams with client enrollment and follow-up.
- Assist in the processing of new client account application forms, trades, and other documentation.
- Manage the account transfer process from other institutions.
- Process and reconcile daily cash movements into the funds.
- Monitor and reconcile daily valuations.
- Follow-up with Investor Specialists on unresolved issues.
- Liaise with external partners to resolve unexpected problems.
- Help manage our office environment.
- Other general administrative duties.
- Contribute to a positive work environment and help back-up team members on other duties.

This is a permanent, full-time position located in Vancouver, starting at 7am daily. There is opportunity for a hybrid workplace model with this role. The details of this model will be established following discussion between the successful candidate and Steadyhand.

The Candidate:

Candidates should possess the following attributes and skills:

- Passionate about client service – willing to go the extra mile for the client.
- Extremely detail-oriented.
- A multi-tasker, flexible, and able to prioritize.
- Outstanding written and verbal communication skills.
- Personable, approachable and outgoing.
- Technology savvy.
- Independent and self-motivated to achieve goals.
- Ability to learn and share knowledge with other team members.
- Knowledge of regulatory and compliance environment.
- University or college education is preferred or equivalent industry experience.
- Mutual Fund backoffice experience, including Fundserv and recordkeeping systems, is an asset.
- Experience and knowledge of various registered plan types (RRSP, RRIF, TFSA, RESP, Locked-In Plans and Estates).

Individuals meeting the criteria above are encouraged to submit their resume to Isabel Lee at McNeill Nakamoto Recruitment Group by emailing their resume and cover letter to isabel@mcnak.com. For questions, Isabel can be reached at 604-662-8967 ext. 102 in confidence. While we thank all candidates for their interest, only selected individuals will be contacted for follow-up.